

# Desk Reference: Person-Centered Caregiver Assessment Techniques

This desk reference offers practical techniques for assessing the needs of older adult family, kin, and tribal caregivers. Using person-centered approaches helps build trust and ensures assessments are strengths-based and conversational in tone. This resource for staff who conduct assessments complements the [National Caregiver Support Collaborative Checklist for Caregiver Assessments](#).

## What is a Person-Centered Assessment?

A person-centered assessment is a collaborative strengths-based process that prioritizes understanding a person's values, preferences, life experiences, and goals.

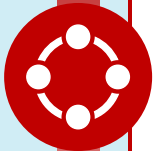
### Elements of Person-Centered Assessment

Adapted from the [Five Competency Domains for Person-Centered Planning \(NCAPPS\)](#)



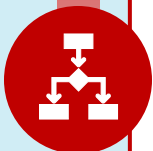
#### Strengths-Based and Whole Person-Focused

- ▶ Recognize growth, culture, and the individual's full identity and lived experience.
- ▶ *Example: Ask about caregiving practices that are rooted in cultural traditions, or what the caregiver feels proud of managing day-to-day.*



#### Cultivating Connections Inside and Outside the System

- ▶ Identify formal and informal sources of supports.
- ▶ *Example: Create a visual or map of the caregiver's network, including friends, family, community groups, and formal services; and highlight areas where additional support may be needed.*



#### Rights, Choice, and Control

- ▶ Educate and empower the caregiver to direct their care and advocate for themselves.
- ▶ *Example: A caregiver may feel obligated to respect the care recipient's wishes, even at the expense of their own health. A person-centered assessment helps to understand that dynamic without judgement.*



#### Partnership, Teamwork, Communication, and Facilitation




- ▶ Engage in respectful, team-based planning; facilitate meetings with clarity and purpose.
- ▶ *Example: Instead of directly following a checklist of conversation points, pause and ask, "What do you want to make sure we talk about today?"*



#### Person-Centered Plan Documentation, Implementation, and Quality Monitoring

- ▶ Co-create living documents that reflect goals, track progress, and are updated regularly.
- ▶ *Example: Include direct quotes from the caregiver (e.g., "I need one afternoon a week to rest.").*

## Key Tools in Action

-  **Important To/Important For**
  - ▶ Helps guide assessment conversations that balance what matters most to the caregiver with what is important for their well-being.
-  **Mapping Relationships**
  - ▶ Builds understanding of the caregiver's network (e.g., who they lean on, who they care for, and who influences their daily life).
  - ▶ Offers two LifeCourse tools, the Reciprocal Roles Tool and the Mapping Relationships Tool, that assess social connectedness and sources of support or stress.
-  **Motivational Interviewing: Supervisory Tools for Enhance Self-Proficiency (MIA-STEP)**
  - ▶ Helps reflect and strengthen motivational interviewing (MI) skills (e.g., asking open-ended questions, affirming caregiver experiences, and practicing active listening).
  - ▶ Uses MI techniques to help assessors build trust and explore sensitive topics (e.g., stress, reluctance to accept help, emotional challenges) by creating space for caregivers to express their needs and concerns.

## Tips for Getting Started

### Be present

- ▶ Build trust by actively listening and showing interest in the caregiver's story. Begin with the issues most pressing for them.
- ▶ *Example: "What would you like me to understand about your caregiving role before we begin?"*

### Use language preferred by the person

- ▶ Use person-centered language and ask how they prefer to be addressed.
- ▶ *Example: "How do you prefer I refer to your role or experience during our conversation?"*

### Ask open-ended questions

- ▶ Invite storytelling with questions that explore values and daily life. Open-ended questions help uncover what matters most and can often provide the information needed for required assessment fields.
- ▶ *Example: "Tell me about a typical day." or "What's something that brings you joy?"*

### Use simple visuals to guide conversations

- ▶ Use tools like relationship maps to help caregivers express their support network.
- ▶ *Example: "Would it be helpful to draw out who's part of your support circle?"*

### Capture what matters

- ▶ Document what brings meaning to the caregiver. Include information on routines, preferences, cultural identity, and goals. When possible, include the person's own words to preserve voice.
- ▶ *Example: "What helps you feel supported?"*

### Support informed choice and accountability

- ▶ Clearly present options and ensure understanding through supportive tools, while also specifying who is responsible for each decision and action.
- ▶ *Example: "Before we move on, let's confirm the plan reflects your goals and notes who will complete each action."*

### Follow up to ensure needs are addressed

- ▶ Check in regularly to ensure expressed needs lead to meaningful support.
- ▶ *Example: "The last time we spoke, you mentioned needing more time for yourself. Has anything changed since then?"*

## Learn More

[National Caregiver Support Collaborative Checklist for Caregiver Assessments](#)

### Contact:

For more information on caregiver assessments, please contact the NCSC by e-mail ([caregivercollaborative@acl.hhs.gov](mailto:caregivercollaborative@acl.hhs.gov)).